

## Requesting a Lean Event – Area Agencies on Aging

Area Agencies on Aging may request that Department on Aging staff facilitate a Lean event using the procedure below.

### Step 1: Schedule a Lean Training (2 hours).

Lean training is required for those agencies that have not hosted a Lean event previously. This training covers Lean's key principles, tools, strategies for success, and roles & responsibilities. The training can be done via webinar. Agency directors and program management staff are the target audience for this training.

**Brief Overview.** Lean consists of several strategies to improve product or service delivery for the customer. Organizations utilize Lean strategies to:

1. Improve an existing service or product delivery process by eliminating the wastes, delays, and inefficiencies that developed as the process evolved over time (Business Process Kaizen).
2. Define a process for a new service or product delivery (Design for Lean Six Sigma);
3. Identify important trends or areas for improvement within a single organization or among overlapping processes in multiple agencies or divisions (Value Stream Mapping);  
or
4. Reduce, reorganize, or optimize items warehoused or moved through a physical space (5S).

A Lean event is successful when the targeted process is specific with begin and end points defined and when the sponsor gives authority to the team to create and implement a new process.

Please refer to the Iowa Department of Management's Office of Lean Enterprise's web site for more information: <http://lean.iowa.gov/index.html>. This web page has an overview of different Lean events conducted by numerous state agencies: <http://lean.iowa.gov/results/index.html>.

Contact [Ruth.Thompson@iowa.gov](mailto:Ruth.Thompson@iowa.gov) / 515-725-3309 or [Shan.Sasser@iowa.gov](mailto:Shan.Sasser@iowa.gov) / 515-725-2184 to schedule training.

### Step 2: Review Agency Commitments.

The department and your agency must commit resources to a Lean event.

#### Department on Aging

The department will arrange for or provide trained Lean facilitators for the event.

- Facilitation requires approximately 75 hours of time from the lead facilitator and 60 hours from the co-facilitator. (This time includes event prep work, facilitation, and 30 day, 60 day, 90 day, and 1 year follow-ups.)

### **Area Agency on Aging**

The agency or agencies requesting / hosting a Lean event will provide the following:

- Travel costs (mileage, lodging, and meals) for the facilitators during the event if hosted outside of Des Moines (plan for 5 nights for lodging & 5 days for meals for two facilitators).
- Event Sponsor (An event sponsor is the person who gives the team the authority to define & implement a new process. Time commitment varies; however an event sponsor is expected to work with facilitators to plan an event, attend the pre-event meeting with team, & be available for daily and final report out).
- Event team leader and members committed to participate in the event for five, full days and complete pre- and post-event homework (number of team members vary depending on the event; 7-10 team members is average).
- Event supplies (approx. cost: \$250).
- A room to host the event (same room each day). The room must be large enough to allow participants to separate into small groups and have at least one blank wall for posting information.
- Arrange for lunch orders to be taken for each day of the event.

### **Step 3: Identify a Process / Project for a Lean Event.**

- a) List ideas on areas or processes for improvement in your agency.

You do not need to be too detailed about the process or business area you would like to improve at this point or identify which Lean strategy you would like to use. The lead Lean facilitator will work with you to refine your proposed event and identify which Lean strategy will work best.

Agencies can co-host events and/or include staff from across agencies.

If you are unsure whether you are providing too little or too much information, contact Ruth Thompson or Shan Sasser.

- b) Prioritize your list.

As you prioritize, consider which business area or process will have the greatest impact on your customer. Keep in mind that initial proposals are often refined to make the Lean event manageable and successful.

### **Step 4: Submit Request for a Lean Event to the Department.**

To request facilitators for a Lean event, complete the Lean Facilitator Request form and send the completed form to the department's assistant director. The request will be reviewed with the department's Lean facilitators.

### **Approved Requests**

If approved, the request will be provided to the *Iowa Department of Management's Office of Lean Enterprise*. (The Office of Lean Enterprise will record / track the event and provide support to the Lean facilitators, including arranging for alternate facilitators as needed.)

The lead Lean facilitator will contact the event sponsor to begin planning the event. (Refer to the "Activities & Timelines for Approved Lean Events" information below for details.)

### **Rejected Requests**

If not approved, the department will provide a reason for disapproval, such as availability of facilitators or clarification on need for event.

## **Activities & Timelines for Approved Lean Events**

### **1. Planning (2 – 3 months prior to event)**

- a. Define scope, select team members, arrange location & travel, identify materials needed, etc.
- b. Complete a Memorandum of Understanding to define the resources the department and agency are providing to the Lean event. (Refer to agency commitments detailed above.)

### **2. Pre-Event Meeting (2 to 4 weeks prior to event)**

Finalize event charter, assign pre-event homework, and verify event location & travel arrangements.

### **3. Lean Event Held**

Events are scheduled for 5 days.

### **4. Follow-ups (30 days from event / 60 days from event / 90 days from event / 1 year from event).**